VoIP Migration Checklist: Your 30-Day Action Plan

Project : _____

Date : _____

Lead : _____

This checklist is designed to guide UK businesses through the key stages of selecting and deploying a new VoIP system, ensuring nothing is missed.

Phase 1: Discovery & Self-Assessment (Week 1)

Objective: Understand your current state and define your needs.

- **Inventory Existing Telecoms:**
  - List all business phone numbers (DDI, 08xx, 03xx, etc.)
  - Count physical handsets and note models.
  - Document current call flow (e.g., how calls reach reception, sales, support).
  - Review current contract end dates and termination terms.

- **Map User Requirements:**
  - Number of users needing an extension.
  - Identify user groups (e.g., reception, sales team, remote workers).
  - List must-have features (e.g., Mobile App, IVR, Call Recording, CRM Integration).
  - List nice-to-have features.

- **Assess Network Readiness:**
  - Conduct an internet speed test (speedtest.net).

- Check current router supports QoS (Quality of Service).
- Evaluate Wi-Fi coverage for softphone use.
- Consider a professional network audit for larger sites.

- **Define Compliance Needs:**
  - Do you require call recording? If yes, define the lawful basis (UK GDPR).
  - Identify any "at-risk" users who need a plan for 999 access during a power cut.

Phase 2: Vendor Selection & Quoting (Week 2-3)

Objective: Get comparable quotes from reputable providers.

- **Shortlist 2-3 Providers:**
  - Seek recommendations, read reviews, and check Ofcom complaints data.

- **Request Line-Item Quotes:**
  - Monthly per-user subscription cost (for each tier).
  - One-time setup/onboarding fees.
  - Cost for new IP phones (per model).
  - Number porting fees and process.
  - Cost for additional numbers (e.g., 03xx).
  - Call bundle inclusions and out-of-bundle rates.

- **Ask Key Questions:**
  - "What is your process for handling 999/112 emergency calls?"
  - "Where are your data centres located? (UK-based is preferable for latency)"
  - "Is TLS/SRTP encryption enabled by default?"

- "What are your SLAs for support response and service availability?"
- "Can you provide a reference from a similar UK business?"

Phase 3: Pre-Implementation Planning (Week 3)

Objective: Finalise the decision and prepare for rollout.

- **Review & Compare Quotes:**
  - Compare like-for-like feature sets and total cost of ownership (TCO).
  - **SELECTED VENDOR:** _____

- **Gather Number Porting Information:**
  - Prepare recent phone bills (proof of ownership).
  - Complete Letters of Authorisation (LOA) provided by the new supplier.

- **Plan the Rollout:**
  - Choose a pilot group (e.g., IT team or a single department).
  - Schedule the main porting date(s). *Avoid big-bang migrations.*
  - Schedule user training sessions.

- **Order Equipment & Prepare Network:**
  - Order new handsets if required.
  - Configure QoS on your router to prioritise voice traffic.

Phase 4: Implementation & Go-Live (Week 4)

Objective: Execute the migration smoothly.

- **Pilot Phase:**
  - Deploy the system to the pilot group.
  - Test key features: inbound/outbound calls, IVR, voicemail-to-email.
  - Verify call quality and address any network issues.

- **User Training & Communication:**
  - Distribute user guides (softphone/mobile app setup).
  - Communicate the change and go-live date to all staff.
  - Inform key contacts/clients of any number changes if applicable.

- **Go-Live & Porting:**
  - Confirm porting timeline with the provider.
  - Have a fallback plan (e.g., mobile phones) for the porting window.
  - Test all numbers immediately after porting is complete.

Phase 5: Post-Launch & Optimisation (Ongoing)

Objective: Ensure long-term success.

- **Monitor & Gather Feedback:**
  - Check system health dashboards for jitter, latency, packet loss.
  - Ask users for feedback on call quality and usability.

- **Tweak Configuration:**
  - Adjust IVR messages or call routing based on real usage.
  - Review call reports and analytics.

- **Confirm Compliance:**
  - Document your 999 access plan for at-risk users.
  - Ensure your Privacy Notice is updated if you are recording calls.

- **Schedule Regular Reviews:**
  - Review call spend and user licenses quarterly.
  - Schedule an annual review with your provider.

Disclaimer: *This checklist is a guide. Specific requirements may vary based on your business size and complexity. Always ensure compliance with UK regulations (GDPR, Ofcom).*

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GDPR
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